Sharing Quotes with Customers & Submitting Quotes for Apple Approval and Booking through SSO

Sharing Quotes with Customers

What's new?
There are a few things to consider when using Apple CRM to share Quotes with customers:

- Emailing a Quote is fully integrated into Apple CRM, reducing the steps it takes to share a Quote with a customer.
- Comments that you normally would enter in an email body for your customer can only be shared either through the Customer Comments section when creating the Quote or in a separate follow up email to the customer
- A QR code is included on every Quote making it easy to look up a business customer in store.This QR code will appear once the email is generated and sent to your customer.
- Scanning the QR code in EasyPay allows you to look up a customer's Sales Account and link the transaction seamlessly.
- Quotes can also be directly sent to your customer's Custom Store (where applicable).

Note - Apple CRM will allow you to print a quote to a PDF but it will not create the QR code this way—it is recommended you email the quote to the customer and print the Quote from the email if you wish to print the Quote in Store.

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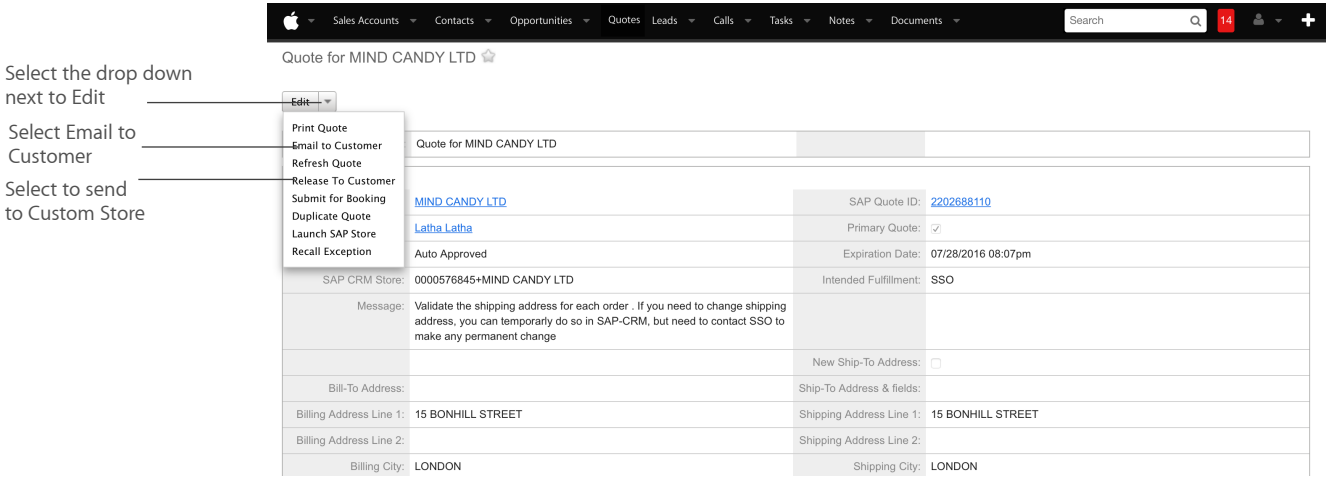
Emailing Quotes to Customers or Sending Quotes to Custom Stores

1. From the Quote Detail view, select the drop down arrow next to Edit.
2. Select Email to Customer. This option will only appear if the Quote is Corporate Approved or Auto Approved.
3. To send the Quote to the Customer's Custom Store, select Send to Custom Store.



4. Select the Pro Forma or Quote template to send.
5. Select the fulfillment method and Payment Options/Financial Options.
6. Include any comments or notes for the customer in the Comments to Customer field. Note, the body of the email cannot be edited. *Please ensure any additional information for the customer that would be included in the body of the email is entered here, or send the customer a separate email letting them know you will be sending them a Quote or have sent them a Quote.*

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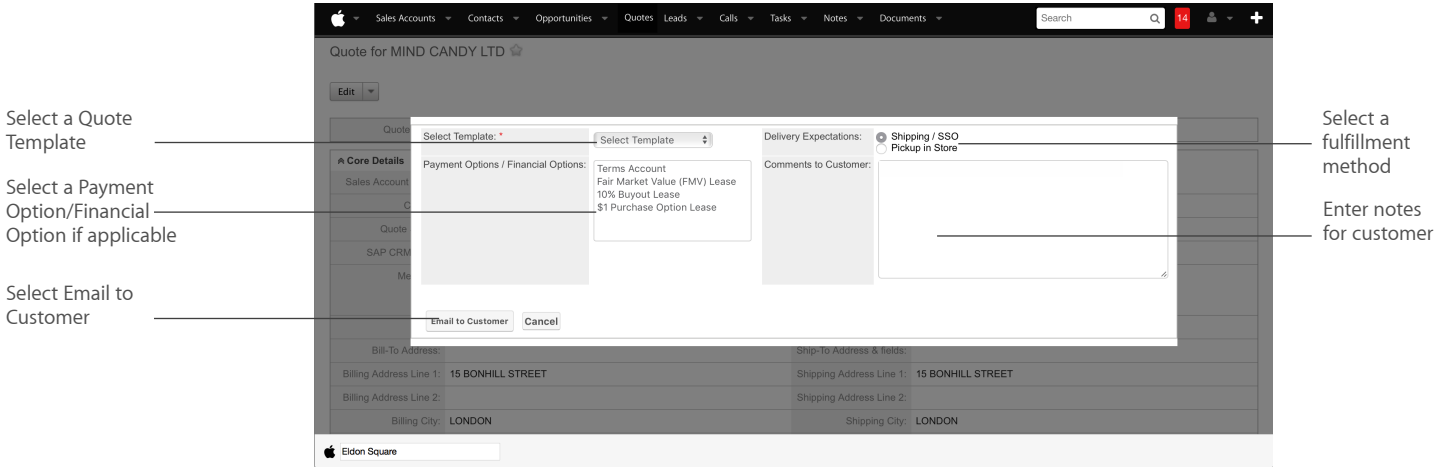
7. Select Email to Customer.



8. Remember that the body of the email cannot be edited, and any additional information for the customer should be included in the Comments to Customer field. These comments will show on the Quote and in the email under the Additional Notes section of the Quote.

9. Note, Apple CRM will send a Quote with a Sales Account QR code. The QR code is generated as the email is sent to the customer and will appear as in the email draft in Apple CRM, due to Safari functionality. The customer facing Quote delivered in the email will contain the actual QR code and not this symbol , only Apple users will see the symbol when drafting an email. The Store business email will be CC'ed on all emails, making it easy to retrieve a copy of the quote with the QR code for our team.

10. Select Send.

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Using Apple CRM Quotes in Store with QR Code

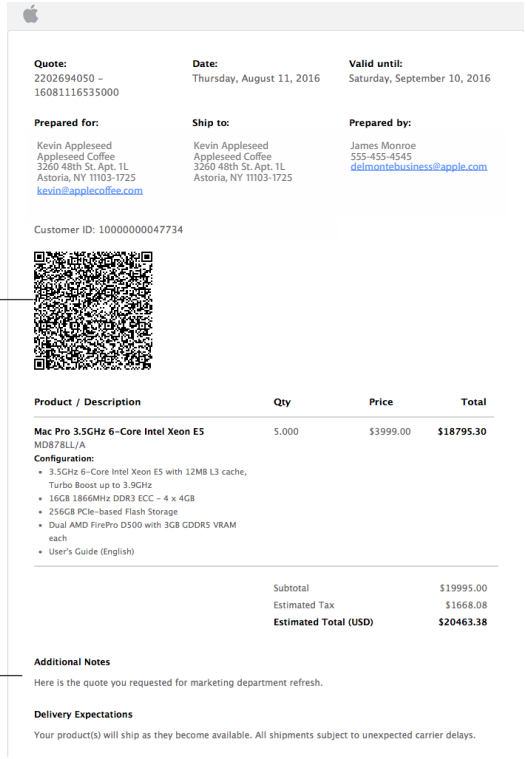
- QR codes will only be generated on a Quote that is emailed to the customer and your team's email directly from Apple CRM
- Remember that the QR code will appear as in Apple CRM, and will be replaced by a QR code when the email is generated.
- If the customer requests a physical copy you can print from Apple CRM but these Quotes will not contain the QR code.

To learn more about how to use the QR code in Store to look up a Sales Account, refer to the *Business in EasyPay Guide* in RetailMe

Once the email is generated and sent, the QR code will appear in place of

Customers can bring a copy of this Quote or the email itself to the Store to have their in Store transaction easily linked to their Sales Account

Additional information for the customer that was included in the Comments to Customer field when creating the email will appear here



Quote:
2202694050 – 16081116535000

Date:
Thursday, August 11, 2016

Valid until:
Saturday, September 10, 2016

Prepared for:
Kevin Appleseed
Appleseed Coffee
3260 48th St. Apt. 1L
Astoria, NY 11103-1725
kevin@applecoffee.com

Ship to:
Kevin Appleseed
Appleseed Coffee
3260 48th St. Apt. 1L
Astoria, NY 11103-1725

Prepared by:
James Monroe
555-455-4545
delmontebusiness@apple.com

Customer ID: 10000000047734

Product / Description	Qty	Price	Total
Mac Pro 3.5GHz 6-Core Intel Xeon E5 MD878LL/A **Configuration:** • 3.5GHz 6-Core Intel Xeon E5 with 12MB L3 cache, Turbo Boost up to 3.9GHz • 16GB 1866MHz DDR3 ECC – 4 x 4GB • 256GB PCIe-based Flash Storage • Dual AMD FirePro D500 with 3GB GDDR5 VRAM each • User's Guide (English)	5.000	$3999.00	**$18795.30**

Subtotal	$19995.00
Estimated Tax	$1668.08
Estimated Total (USD)	**$20463.38**

Additional Notes

Here is the quote you requested for marketing department refresh.

Delivery Expectations

Your product(s) will ship as they become available. All shipments subject to unexpected carrier delays.

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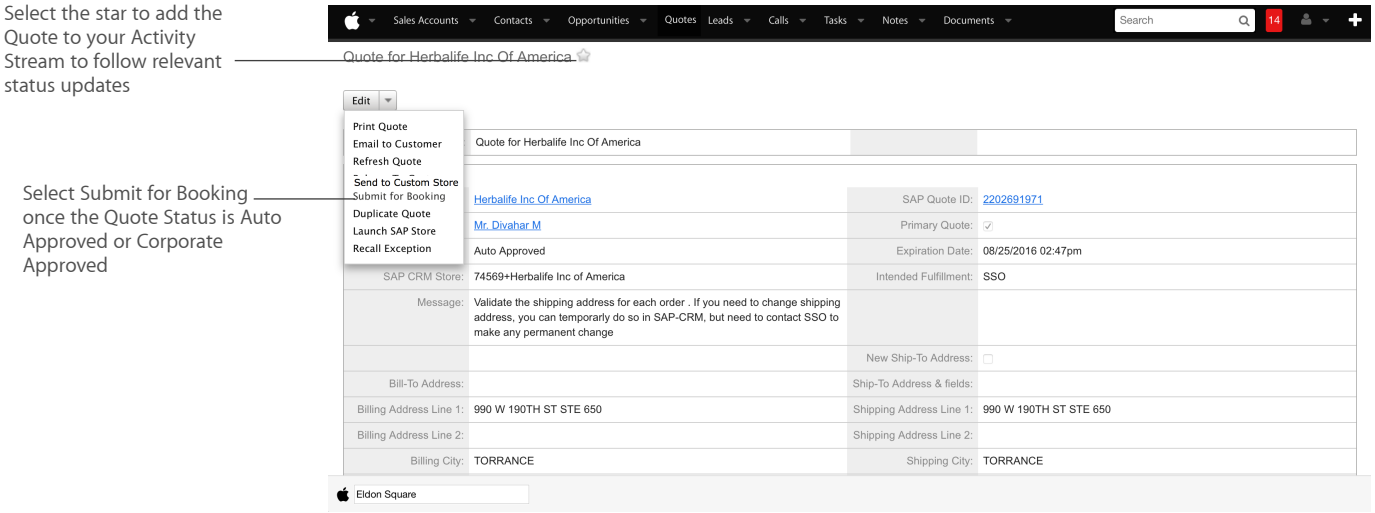
Submit a Quote for Approval

When a Quote requires Corporate Approval, the SEA Tool will be used by the Engagement Team to provide approval or next steps. Each Quote is provided an SEA number that can be found on the Quote details screen and links directly to the SEA details.

1. Once the Quote is Corporate Approved or Auto Approved, select the drop down menu next to Edit.
   - Note: Once a quote has been approve by the Engagement team you will receive an email notification in your inbox.
2. Select Submit for Booking.
3. It is recommended that you click the Star to add the Quote to your Activity Stream to follow relevant status updates.


Select the star to add the Quote to your Activity Stream to follow relevant status updates
Select Submit for Booking once the Quote Status is Auto Approved or Corporate Approved
Sales Accounts
Contacts
Opportunities
Quotes
Leads
Calls
Tasks
Notes
Documents
Search
Quote for Herbalife Inc Of America
Edit
Print Quote
Email to Customer
Refresh Quote
Send to Custom Store
Submit for Booking
Duplicate Quote
Launch SAP Store
Recall Exception
Herbalife Inc Of America
SAP Quote ID: 2202691971
Mr. Divahar M
Primary Quote:
Auto Approved
Expiration Date: 08/25/2016 02:47pm
SAP CRM Store: 74569+Herbalife Inc of America
Intended Fulfillment: SSO
Message: Validate the shipping address for each order . If you need to change shipping address, you can temporarly do so in SAP-CRM, but need to contact SSO to make any permanent change
New Ship-To Address:
Bill-To Address:
Ship-To Address & fields:
Billing Address Line 1: 990 W 190TH ST STE 650
Shipping Address Line 1: 990 W 190TH ST STE 650
Billing Address Line 2:
Shipping Address Line 2:
Billing City: TORRANCE
Shipping City: TORRANCE
Eldon Square

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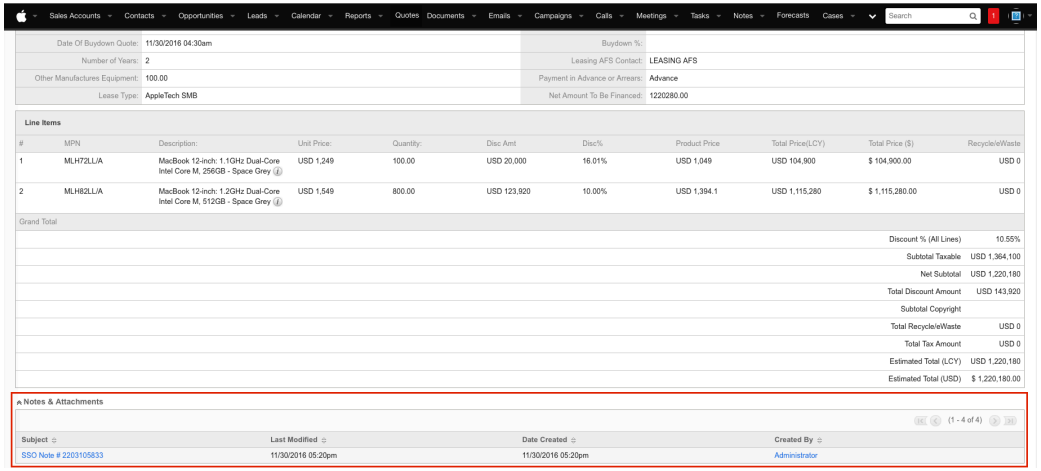
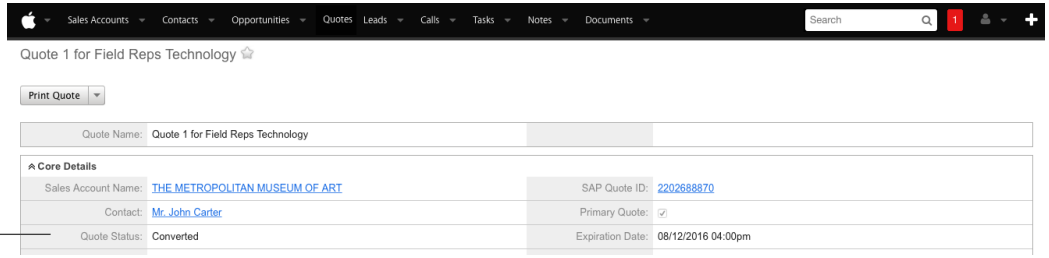
4. If SSO requires additional information then their request will appear in the Notes & Attachments section of


Sales Accounts
Contacts
Opportunities
Leads
Calendar
Reports
Quotes
Documents
Emails
Campaigns
Calls
Meetings
Tasks
Notes
Forecasts
Cases
Search
Date Of Buydown Quote: 11/30/2016 04:30am
Buydown %:
Number of Years: 2
Leasing AFS Contact: LEASING AFS
Other Manufactures Equipment: 100.00
Payment in Advance or Arrears: Advance
Lease Type: AppleTech SMB
Net Amount To Be Financed: 1220280.00
Line Items
MPN Description: Unit Price: Quantity: Disc Amt Disc% Product Price Total Price(LCY) Total Price ($) Recycle/eWaste
1 MLH72LL/A MacBook 12-inch: 1.1GHz Dual-Core Intel Core M, 256GB - Space Grey USD 1,249 100.00 USD 20,000 16.01% USD 1,049 USD 104,900 $ 104,900.00 USD 0
2 MLH82LL/A MacBook 12-inch: 1.2GHz Dual-Core Intel Core M, 512GB - Space Grey USD 1,549 800.00 USD 123,920 10.00% USD 1,394.1 USD 1,115,280 $ 1,115,280.00 USD 0
Grand Total
Discount % (All Lines) 10.55%
Subtotal Taxable USD 1,364,100
Net Subtotal USD 1,220,180
Total Discount Amount USD 143,920
Subtotal Copyright
Total Recycle/eWaste USD 0
Total Tax Amount USD 0
Estimated Total (LCY) USD 1,220,180
Estimated Total (USD) $ 1,220,180.00
Notes & Attachments
(1 - 4 of 4)
Subject Last Modified Date Created Created By
SSO Note # 2203105833 11/30/2016 05:20pm 11/30/2016 05:20pm Administrator

the Quotes submitted. Click on the Note subject name to view the pushback details.

5. Once the request from SSO has been actioned, repeat steps 1 and 2 to Submit for Booking.

6. Once the Quote has been Submitted for Booking and actioned by SSO, it will change to a Converted status as shown in the Quote Status field in the Quote view.



View when a Quote is Converted in the Quote Status field of a Quote

7. You can also view Quote Status in the Quotes sub-panel in the Opportunity or Sales Account.

Or view the Quote Status in the Quotes sub-panel of an Opportunity or Sales Account

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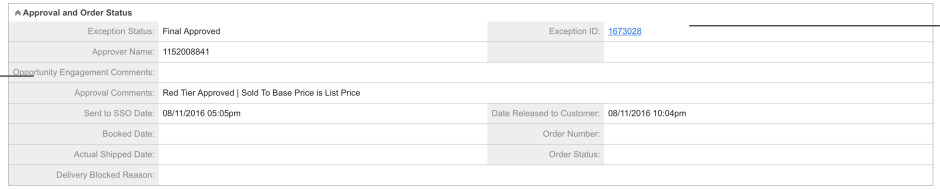
Sales Exception Approval (SEA) Tool for Opportunities Submitted for Approval

When a user submits a Quote for approval, Apple CRM will submit the Quote to the Engagement Team using the SEA Tool. Note, the SEA Tool is not used for Opportunities that are Auto Approved.

Approvals are managed by the Engagement Team using the SEA Tool and Apple CRM users will be able to view Engagement Team comments and other order related details in the SEA Tool. This section will detail how to view information in the SEA Tool when submitting an Opportunity for Corporate Approval.

1. After submitting a Quote for Corporate Approval, you will be able to see the most recent approval comments on the Quote detail view. You can also access the SEA Tool by clicking the Exception ID on the Quote to see the full approval comments history (if applicable).

View the most recent approval comment on the Quote detail view


Approval and Order Status
Exception Status: Final Approved
Exception ID: 1673028
Approver Name: 1152008841
Opportunity Engagement Comments:
Approval Comments: Red Tier Approved | Sold To Base Price is List Price
Sent to SSO Date: 08/11/2016 05:05pm
Date Released to Customer: 08/11/2016 10:04pm
Booked Date:
Order Number:
Actual Shipped Date:
Order Status:
Delivery Blocked Reason:

Select an Exception ID to view the approval details

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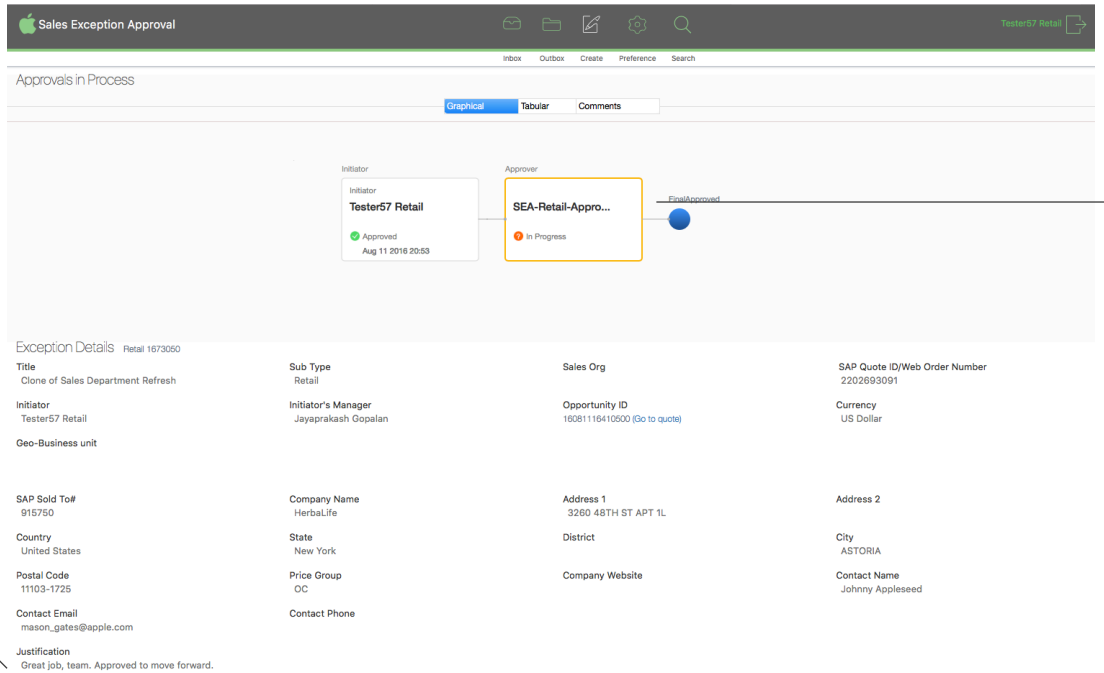
2. Clicking the Exception ID in the Apple CRM Quote will bring up the SEA Tool in a new window. Here you can view where the Quote is in the approval workflow. You can also view Opportunity Engagement Comments entered on the Quote in Apple CRM in the Justification field in the SEA Tool.



View where the Quote is in the approval workflow here

Opportunity Engagement Comments (e.g. BL or BM Notes) appear here in the SEA Tool

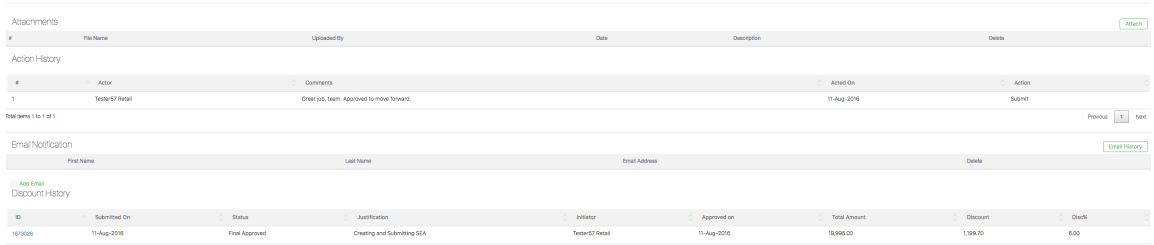
3. To view all Engagement Team Comments, scroll down to the Action History section within the SEA Tool.

4. Discount History will display previous Quotes that have been submitted to the SEA Tool for this specific Sales Account.

5. Once an Opportunity is Approved by the Engagement Team you will receive an email alerting you that Opportunity has been approved for booking or quoting to the customer.

View the full history of Engagement Team comments in the Action History section

View history of Quotes that have been submitted to SEA Tool for this specific Sales Account


Attachments
Attach
File Name Uploaded By Date Description Delete
Action History
Actor Comments Acted On Action
1 Tester57 Retail Great job, team. Approved to move forward. 11-Aug-2016 Submit
Total items 1 to 1 of 1
Previous 1 Next
Email Notification
Email History
First Name Last Name Email Address Delete
Add Email
Discount History
ID Submitted On Status Justification Initiator Approved on Total Amount Discount Disc%
1673028 11-Aug-2016 Final Approved Creating and Submitting SEA Tester57 Retail 11-Aug-2016 19,995.00 1,199.70 6.00

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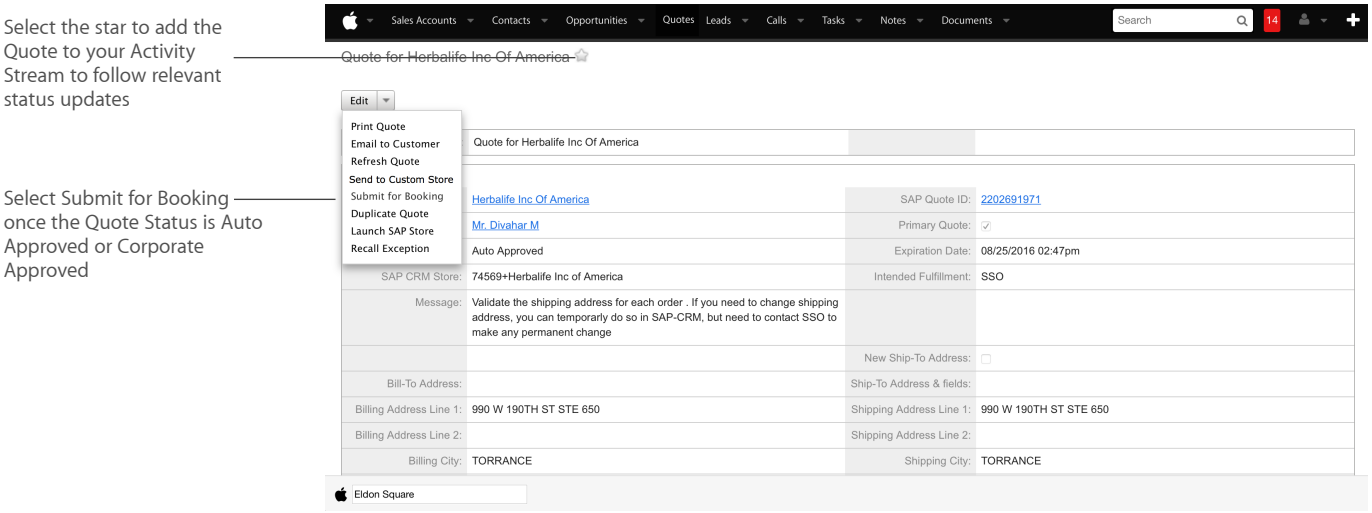
Submitting a Quote for Booking

Follow these steps to submit a Quote for Booking, confirming any necessary details, and tracking orders and shipping.

1. Once the Quote is Corporate Approved or Auto Approved, select the drop down menu next to Edit.
2. Select Submit for Booking.
3. It is recommended that you click the Star to add the Quote to your Activity Stream to follow relevant status updates.



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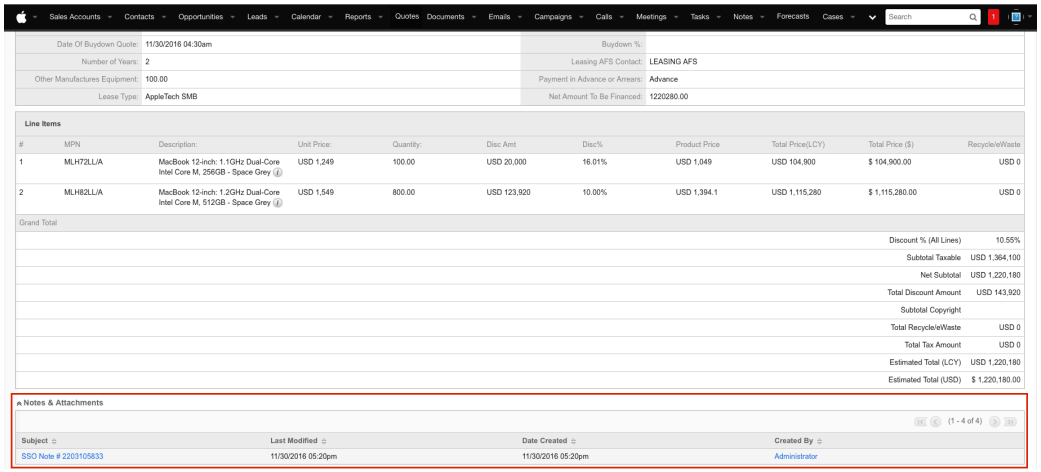
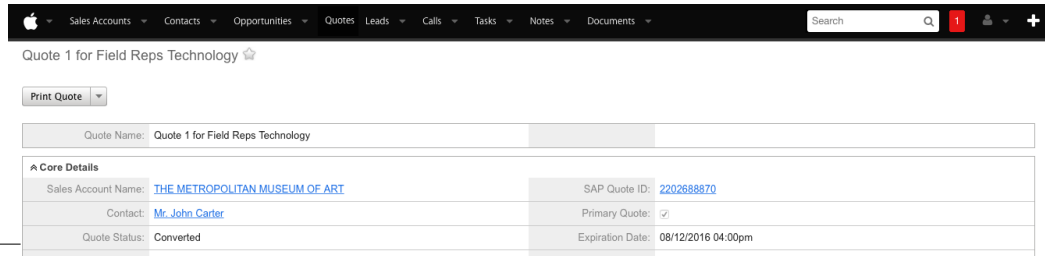

Sales Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Campaigns Calls Meetings Tasks Notes Forecasts Cases
Date Of Buydown Quote: 11/30/2016 04:30am
Buydown %:
Number of Years: 2
Leasing AFS Contact: LEASING AFS
Other Manufactures Equipment: 100.00
Payment in Advance or Arrears: Advance
Lease Type: AppleTech SMB
Net Amount To Be Financed: 1220280.00
Line Items
MPN Description: Unit Price: Quantity: Disc Amt Disc% Product Price Total Price(LCY) Total Price ($) Recycle/eWaste
1 MLH72LL/A MacBook 12-inch: 1.1GHz Dual-Core Intel Core M, 256GB - Space Grey USD 1,249 100.00 USD 20,000 16.01% USD 1,049 USD 104,900 $ 104,900.00 USD 0
2 MLH82LL/A MacBook 12-inch: 1.2GHz Dual-Core Intel Core M, 512GB - Space Grey USD 1,549 800.00 USD 123,920 10.00% USD 1,394.1 USD 1,115,280 $ 1,115,280.00 USD 0
Grand Total
Discount % (All Lines) 10.55%
Subtotal Taxable USD 1,364,100
Net Subtotal USD 1,220,180
Total Discount Amount USD 143,920
Subtotal Copyright
Total Recycle/eWaste USD 0
Total Tax Amount USD 0
Estimated Total (LCY) USD 1,220,180
Estimated Total (USD) $ 1,220,180.00
Notes & Attachments
(1 - 4 of 4)
Subject Last Modified Date Created Created By
SSO Note # 2203105833 11/30/2016 05:20pm 11/30/2016 05:20pm Administrator

the Quotes submitted. Click on the Note subject name to view the pushback details.

5. Once the request from SSO has been actioned, repeat steps 1 and 2 to Submit for Booking.


Sales Accounts Contacts Opportunities Quotes Leads Calls Tasks Notes Documents
Search
Quote 1 for Field Reps Technology
Print Quote
Quote Name: Quote 1 for Field Reps Technology
Core Details
Sales Account Name: THE METROPOLITAN MUSEUM OF ART
SAP Quote ID: 2202688870
Contact: Mr. John Carter
Primary Quote:
Quote Status: Converted
Expiration Date: 08/12/2016 04:00pm

View when a Quote is Converted in the Quote Status field of a Quote

6. Once the Quote has been Submitted for Booking and actioned by SSO, it will change to a Order Booked status as shown in the Quote Status field in the Quote view.

Quotes (3)
Quote Name Created By Primary Quote Created Date Released to Customer Expiration Date Price Tier Status SAP Quote ID
Quote 1 for Field Reps Techno... Tester57 Retail 07/13/2016 03:48pm 08/12/2016 09:00am Converted 2202688870

Or view the Quote Status in the Quotes sub-panel of an Opportunity or Sales Account

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